



## Let's get started!

All requirements for the NIH Conference, Administrative, and Travel Services Contract II (NIHCATS II) are fulfilled using task orders. **The first step towards initiating the task order process is completing a Task Order Request Package (TORP).** The TORP will provide details of the specific services requested. This document will guide you through the information required for manual creation of a TORP for NIHCATS II.

*In the future, NIHCATS II will operate using the NIHCATS II electronic Government Ordering System (eGOS). The NIHCATS II website (<http://NIHCATSII.olao.od.nih.gov/>) will be updated at that time to provide specific, streamlined guidance on how to use eGOS for creating task order requests. **This TORP form will not be used after implementation of eGOS.***

When NIH or a Federal agency determines a need exists for a conference, meeting, or travel services, a Task Order (TO) Contracting Officer's Representative (COR) must be identified. The Task Order COR may or may not be the requestor for services, but must be FAC-COR certified. The Task Order COR completes the TORP, and is responsible for all technical aspects of the task order.

### **NOTE: For Task Orders involving conferences/meetings:**

**For NIH ICs:** All required conference/meeting forms and waivers (if applicable) based upon NIH's most recent policy guidance must be approved and submitted with this TORP.

**For Federal Agencies (other than NIH):** All required conference/meeting forms and waivers (if applicable) based upon the Agency/OPDIV's most recent policy guidance must be approved and submitted with this TORP.

For more information on NIH's Efficient Spending Policy, please visit:  
<http://oamp.od.nih.gov/ContractToolBox/SpendingPolicy.asp>



## Do you have everything?

The TORP form collects standardized information and supporting documentation from all customers. A complete TORP will include:

<input checked="" type="checkbox"/>	Completed TORP forms (attached)
<input checked="" type="checkbox"/>	Statement of Work (SOW) providing a description of the work required and any other specific information related to the task order
<input checked="" type="checkbox"/>	Independent Government Cost Estimate (IGCE) (not released to contractors)
<input checked="" type="checkbox"/>	For Task Orders involving conferences/meetings – all required conference/meeting forms and waivers (if applicable) with approvals
<input checked="" type="checkbox"/>	Funding Document (certifying the availability of funds to cover the estimated cost of the task order)

Please see sample SOW on the 'Resources' tab of our website for example level of detail requested.

The IGCE is an estimate (based on historical quotes, market research, etc.) created by customers that is not released to contractors.



## Time to submit for review!

All of the documents and forms mentioned above should be included with this TORP!

After confirming all information and fields of the TORP are complete, **the Task Order COR will submit the TORP to the Task Order Contracting Officer (CO) for review. Upon approval, the Task Order CO will forward the TORP to the NIHCATS II CO via e-mail ([NIHCATSII@mail.nih.gov](mailto:NIHCATSII@mail.nih.gov)).** The NIHCATS II CO and NIHCATS II COR will assign a TORP number, review the TORP for scope and completeness, and will contact the Task Order CO with any questions, if necessary. Upon approval of the TORP, the NIHCATS II CO will release the TORP to the contractors.

Please refer to the NIHCATS II Website (<http://NIHCATSII.olao.od.nih.gov>) to view the complete Task Order Guidelines. Contact the NIHCATS II Program Support Team ([NIHCATSII@mail.nih.gov](mailto:NIHCATSII@mail.nih.gov)) for additional information.

(To be completed by the NIHCATS II CO)

**TORP Number:** 10XX

***This form will guide you through the required information and fields for creation of a Task Order Request Package (TORP) under the NIH Conference, Administrative, and Travel Services II (NIHCATS II) Contracts.***

## 1. Requestor Information

Requesting NIH IC/Federal Agency	< Requesting NIH IC/Federal Agency >
Requestor Name:	< Requestor Name >
Requestor E-Mail Address:	< Requestor E-Mail Address >
Requestor Phone Number:	( <input type="text" value="XXX"/> ) <input type="text" value="XXX"/> - <input type="text" value="XXXX"/>
Verify that the Task Order (TO) Contracting Officer's Representative (COR) is "FAC-COR certified".	<input checked="" type="checkbox"/> Yes, the Task Order COR is "FAC-COR certified".
TO Contracting Officer's Representative Name:	< TO COR Name >
TO Contracting Officer's Representative E-Mail Address:	< TO COR E-Mail Address >
TO Contracting Officer's Representative Phone Number:	( <input type="text" value="XXX"/> ) <input type="text" value="XXX"/> - <input type="text" value="XXXX"/>
Verify that the Task Order (TO) Contracting Officer (CO) is "FAC-CO certified".	<input checked="" type="checkbox"/> Yes, the Task Order CO is "FAC-CO certified".
TO Contracting Officer Name:	< TO CO Name >
TO Contracting Officer E-Mail Address:	< TO CO E-Mail Address >
TO Contracting Officer Phone Number:	( <input type="text" value="XXX"/> ) <input type="text" value="XXX"/> - <input type="text" value="XXXX"/>

For more information regarding the task order process, roles and responsibilities, etc., please reference the NIHCATS II Standard Operating Procedures available on the 'Resources' tab of our website (<http://NIHCATSII.olao.od.nih.gov>).

## 2. Task Order Title

**Customers should create a meaningful title for their task order. The task order title will be viewable by contractors when opening the TORP.**

< Task Order Title >

## 3. Contract Type

This task order will be performed on a:

<input checked="" type="checkbox"/>	Fixed Price Basis
<input type="checkbox"/>	Time and Materials Basis (For Time and Materials task orders, please attach the required D&F)

**(Task orders type may be designated as either Fixed Price AND/OR Time and Materials. Though Fixed Price type task orders are preferred, Time and Materials are permitted with a signed Determinations and Findings (D&F) justifying the use of Time and Materials in accordance with FAR 16.6. Time and Materials type task orders should only be used if Fixed Price type task orders are not suitable for the designated task order.)**

## 4. Fair Opportunity / Partial Small Business Set-Aside

Is this task order an exception to the fair opportunity procedures?

**In accordance with the Federal Acquisition Regulations (FAR), Part 16.505 (b), all twenty (20) contractors will be given an opportunity to respond to each TORP that is released, unless an exception to the fair opportunity procedures is approved.**

**The default response is "No." If "Yes," briefly describe the justification for an exception and attach the approval of the TO Contracting Officer.**

<input checked="" type="checkbox"/>	No
<input type="checkbox"/>	Yes: <div style="border: 1px solid black; height: 100px; margin-top: 10px;"></div>

Please provide a **thorough and justifiable** explanation for any exceptions to the fair opportunity procedures along with all necessary approvals and attachments to this TORP.

**NOTE: The NIHCATS II contracts are a Partial Small Business set-aside. Task order proposals for domestic services with an estimated value of \$500,000 and below will receive priority consideration for award to small businesses as stated in B.2.h of the NIHCATS II contracts.**

**(TORPs will be considered foreign if there is any international element associated with the requirement, including the geographical location of the event or related activities.)**

☒ The task order is for domestic services and valued to under \$500,000

☐ The task order is not for domestic services and/or is valued above \$500,000

### 5. Place of Performance

This task order requires the contractor to provide services from:

<input checked="" type="checkbox"/>	Contractor-Owned Facilities
<input type="checkbox"/>	Government-Owned/Leased Facilities*

**\*If the contractor is required to provide services from Government-Owned/Leased Facilities, please describe the place of performance, as appropriate.**

Please indicate if these services are foreign and/or domestic:

**(TORPs will be considered foreign if there is any international element associated with the requirement, including the geographical location of the event or related activities.)**

<input checked="" type="checkbox"/>	Domestic (within the U.S.)
<input type="checkbox"/>	Foreign

## 6. Period of Performance

The period of performance is from date of award to completion.

Please provide range of  
dates to include your event.

*Enter the estimated period of performance in the space below.*

XX/XX/XXXX - XX/XX/XXXX

## 7. Information Security

All information security (IT) clauses outlined in the NIHCATS II contracts are hereby incorporated by reference. The following security-related information is specific to this task order.

### a. Position Sensitivity Designations

- (1) The following position sensitivity designations, associated clearance, and investigation requirements apply under this task order.

***Check all position sensitivity designations that apply. If more than one of the below designations apply to the task order, the Task Order Contracting Officer (CO), Task Order Contracting Officer's Representative (COR), and Information Systems Security Officer (ISSO) may wish to consider whether there is a need to identify specific Contractor Position Titles with the applicable sensitivity designations. Additional Note: It is expected that the majority of positions under this contract will be Level 1. Levels 2, 3, and 4 are reserved for National Security positions which are generally not applicable to this type of contract.***

***For additional information and assistance for this security clause, please see Table 2, Position Sensitivity Designations for Individuals Accessing Agency Information at: <http://irm.cit.nih.gov/security/table2.htm>.***

<input type="checkbox"/>	<b><u>Level 6:</u></b> Public Trust - High Risk (Requires Suitability Determination with a Background Investigation (BI)). Contractor employees assigned to a Level 6 position are subject to a BI.
<input type="checkbox"/>	<b><u>Level 5:</u></b> Public Trust - Moderate Risk (Requires Suitability Determination with National Agency Check and Inquiry Investigation plus a Credit Check (NACIC), a Minimum Background Investigation (MBI), and/or a Limited Background Investigation (LBI)). Contractor employees assigned to a Level 5 position with no previous investigation and approval shall undergo a NACIC, MBI, and/or LBI.

<input checked="checked" type="checkbox"/>	<p>Level 1: Non Sensitive (Requires Suitability Determination with a National Agency Check and Inquiry Investigation (NACI)). Contractor employees assigned to a Level 1 position are subject to a NACI.</p>
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*(Optional) Use the space below if you wish to provide additional context for any of the levels checked above.*

- (2) Contractor/subcontractor employees shall comply with the HHS criteria for the assigned position sensitivity designations prior to performing any work under this task order. The following exceptions apply:

Levels 5 and 1: Contractor/subcontractor employees may begin work under the task order after the contractor has submitted the name, position and responsibility of the employee to the Task Order COR, as described in subparagraph a.(2) above.

Level 6: In special circumstances the Task Order COR may request a waiver of the pre-appointment investigation. If the waiver is granted, the Task Order COR will provide written authorization for the contractor/subcontractor employee to work under the task order.

b. Information Security Training

HHS policy requires contractors/subcontractors receive security training commensurate with their responsibilities for performing work under the terms and conditions of their contractual agreements. The contractor shall ensure that each contractor/subcontractor employee has completed the NIH Computer Security Awareness Training course at: <http://irtsectraining.nih.gov/> prior to performing any task order work, and thereafter completing the NIH-specified fiscal year refresher course during the period of performance of the task order.

The contractor shall maintain a listing by name and title of each contractor/subcontractor employee working under this task order that has completed the required training. Any additional security training completed by contractor and subcontractor staff shall be included on this listing.

***If the SOW requires that contractor staff take additional security training, please list the additional training requirements in the below box. Otherwise, leave the box empty.***

c. Rules of Behavior

The contractor/subcontractor employees shall comply with the National Institutes of Health (NIH) Information Technology General Rules of Behavior at: <http://irm.cit.nih.gov/security/nihitrob.html>.

d. Personnel Security Responsibilities

The contractor shall perform, adhere to, and document the actions and responsibilities identified in the "Employee Separation Checklist" ([http://nitaac.nih.gov/downloads/ciosp2/Employee\\_Separation\\_Checklist.doc](http://nitaac.nih.gov/downloads/ciosp2/Employee_Separation_Checklist.doc)) when a contractor/subcontractor employee terminates work under this contract. All documentation shall be made available to the Task Order COR and/or Task Order CO upon request.

e. Commitment to Protect Non-Public Departmental Information Systems and Data

(1) Contractor Agreement

The contractor and its subcontractors performing under this SOW shall not release, publish, or disclose non-public Departmental information to unauthorized personnel, and shall protect such information in accordance with provisions of the following laws and any other pertinent laws and regulations governing the confidentiality of such information:

- 18 U.S.C. 641 (Criminal Code: Public Money, Property or Records)
- 18 U.S.C. 1905 (Criminal Code: Disclosure of Confidential Information)
- Public Law 96-511 (Paperwork Reduction Act)

(2) Contractor-Employee Non-Disclosure Agreements

Each contractor/subcontractor employee who may have access to non-public Department information under this task order shall complete the Commitment to Protect Non-Public Information - Contractor Agreement ([http://nitaac.nih.gov/downloads/ciosp2/Contractor\\_Employee\\_Non-Disclosure.doc](http://nitaac.nih.gov/downloads/ciosp2/Contractor_Employee_Non-Disclosure.doc)). A copy of each signed and witnessed Non-Disclosure



agreement shall be submitted to the Task Order COR prior to performing any work under the contract.

f. Confidential Treatment of Sensitive Information

*Include this subsection if the contractor will have access to sensitive information/data during the performance of the task order that needs to be handled confidentially by the contractor, but including the clause at HHSAR352.224-70, Confidentiality of Information, would be inappropriate.*

<input checked="" type="checkbox"/>	<p><b>Check here if Subsection f "Confidential Treatment of Sensitive Information" is NOT APPLICABLE to this task order.</b></p>
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The contractor shall guarantee strict confidentiality of the information/data that it is provided by the Government during the performance of the task order. The Government has determined that the information/data that the contractor will be provided during the performance of the task order is of a sensitive nature.

Disclosure of the information/data, in whole or in part, by the contractor can only be made after the contractor receives prior written approval from the Task Order CO. Whenever the contractor is uncertain with regard to the proper handling of information/data under the contract, the contractor shall obtain a written determination from the Task Order CO.

**8. Government Furnished Equipment (GFE) / Government Furnished Information (GFI)**

*Check any boxes that apply to this task order.*

<input checked="" type="checkbox"/>	<p>Government furnished property will not be provided for the performance of this task order.</p>
<input type="checkbox"/>	<p>Government will provide:</p> <div style="border: 1px solid black; height: 100px; margin-top: 5px;"></div>

**9. Evaluation Criteria**

*Select the evaluation criteria below that apply to your task order.*

*A statement must be made regarding the relative importance of each evaluation criterion. This may be accomplished through the use of an adjective description or the assignment of weights, at the discretion of the customer.*



The Government will award a task order resulting from this solicitation to the responsible Offeror whose offer conforming to the solicitation will be most advantageous to the Government, price and other factors considered. The following factors shall be used to evaluate offers.

**Past performance** = proven quality of company's performance in completing specific tasks.  
**Corporate Experience** = applicability of company's performance in relation to the proposed task order services.

<input type="checkbox"/>	Experience with International Issues
<input checked="" type="checkbox"/>	Corporate Experience
<input checked="" type="checkbox"/>	Past Performance
<input checked="" type="checkbox"/>	Cost / Price

These are the only allowable evaluation criteria to be used in selecting an Awardee. Please reference this list of criteria along with each factor's respective weight (defined in the box below) when completing the Selection Recommendation Document (SRD) during the evaluation stage.

**(SAMPLE LANGUAGE)**

The selection criteria for evaluating the competing prime contractors are to be: 1) Corporate Experience, 2) Past Performance, and 3) Cost/Price. All three criteria will be weighed evenly.

The Task Order CO and Task Order COR will evaluate the Offerors' technical and business task order proposals.

The Government reserves the right to hold clarifications or discussions with contractors. Clarifications or discussions, if held, shall involve at a minimum the Task Order CO, Task Order COR, and contractor management. Others such as the NIHCATS II CO and proposed staff may also participate. Offerors shall be treated equitably and fairly during this evaluation process. After evaluation and clarifications or discussions (if required), the Task Order COR and Task Order CO will perform an analysis of the information contained in the proposals using the stated evaluation criteria.

The Task Order COR and Task Order CO are responsible for ensuring that proprietary information contained in the Offerors' proposals is protected from unauthorized disclosure. It is the contractor's responsibility to ensure that all proprietary information is appropriately marked.

## 10. Response Instructions

*Provide proposal response instructions in the space below. Several recommended instructions have been offered for your convenience.*

- **Contractors shall include separate technical and business proposals.**
- **Technical proposals shall be limited to**  **pages.**

- **Note: For all task orders issued for agencies other than NIH (external customers), contractors shall include a 1% fee as part of their business proposal. This administrative fee will be charged by the contractor and then credited to a designated NIH/OLAO Cost Accounting Number (CAN).**

## 11. Order Processing Schedule

**Enter the desired order processing schedule (subject to NIHCATS II Program Support Team approval).**

**The RELEASE DATE is the day the TORP will be released to the contractors by the NIHCATS II CO.**

Release Date: 7/23/2012

**The QUESTIONS DEADLINE is the day that closes the period that contractors have to submit questions.**

Questions Deadline: Noon on 7/27/2012

**The PROPOSAL DEADLINE is the day when contractors are required to email their technical and business proposals to the Task Order CO. The Task Order CO will establish a solicitation response time that will afford contractors a reasonable opportunity to respond to the requirement. When establishing the solicitation response time, Task Order CO will consider the circumstances of the individual acquisition and account for factors such as the complexity, availability, and value of the requirement.**

Proposal Deadline: Noon on 8/8/2012

Please provide contractors with a reasonable timeline for responding to the task order requirements. Customers will need to respond to contractor questions and provide ample time prior to proposal submissions.

Please take the business calendar into consideration when assigning deadline dates.

Forward the TORP form to the appropriate parties in Microsoft Word (.doc or .docx) format when complete.